



## Getting Started, Step-by-Step

Welcome to VB2, the next generation of the VisitBasis data collection and GPS tracking software. If you have not created an account yet:

1. Go to <https://forms.gle/Ucih5SVzFnRqPatV8>, fill in the information and click on "Submit"
2. Fill in the requested information and click "Next"
3. You will receive a password via email. Enter it and click "Next"
4. Click on "Create Company"
5. Enter the company name and click "Next"

You are ready to go!

### 1 Log in to the Office App

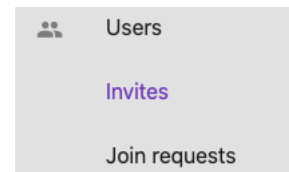
1. Go to <https://visitbasis2.web.app> and click on "Sign In"
2. Enter your email and click "Next"
3. You will receive a password via email. Enter it and click "Next"

### 2 Add Users

You can add users to VB2 in two ways: by inviting them or by approving their join request.

#### Inviting Users

1. Go to Users -> Invites
2. Click on the More Options menu (⋮ on the top-right) and select "Invite User"
3. Enter the requested information and click on "Send Invite"




The user will receive an email invitation via email. They can now download the mobile app from the Apple App Store or Google Play and login.

### 3 Create Scenario

Scenarios are the activities your reps will perform while visiting Places - basically, the information you need to capture from each Place. To create Scenarios:

1. Go to "Scenarios"
2. Click on the More Options menu and select "Create scenario"
3. Fill in the information:
  - Scenario name (required)
  - Description (optional)
  - Report time budget (hh:mm) – how long you expect it will take for your rep to complete this scenario (optional)

- Response destination – if you want to separate data into buckets, by project or season, for instance (optional)
  - Check or not the box “Use without ticket or job” – if the box is checked, your reps will be able to add reports on this scenario anytime, anywhere
  - Check or not the box “Notify editors of new report” – if the box is checked any followers of this scenarios who are editors will receive notifications of new reports
4. Click on the  icon on the navigation bar to move to the Questions window
  5. Import your questions by copying/pasting the question table from Excel or Google Sheets into the text box. Click on the link “Examples” to see what the question table should like and what are the parameters – **for this exercise, copy/paste the questions from the example**
  6. Click on Done

You have created your first basic Scenario. In addition to Questions, the other tabs on the Scenario window are:

- Options, for question options such as multiple choices, different checkboxes, etc.
- Products, for the product matrix that the questions will apply to

### 3.1

In order for a rep to be able to create a report for a Scenario, they need to be followers of such Scenario. To add follower(s) to a Scenario:

1. Select one or more Scenarios
2. Click on the More Options menu and select “Add followers”
3. Select the user(s) – you can search or filter by teams
4. Select whether the user(s) will be editor(s) as well – editors can make changes to the report after it has been submitted
5. Click on “Apply”

Your reps can now use the VB2 mobile app to file scenario reports.

## 4

### Add Places

You can add places to VB2 in two ways: by adding them individually or by copying/pasting a spreadsheet from Excel/Google Sheets.

#### Adding Places Individually

1. Go to Places
2. Click on the More Options menu and select “Create Place”
3. Enter the requested information. If you don’t know the GPS coordinates for the address, type in the street, city, postal code, and country information and click on “From address”
4. Click on “Create Place”

#### Importing Places

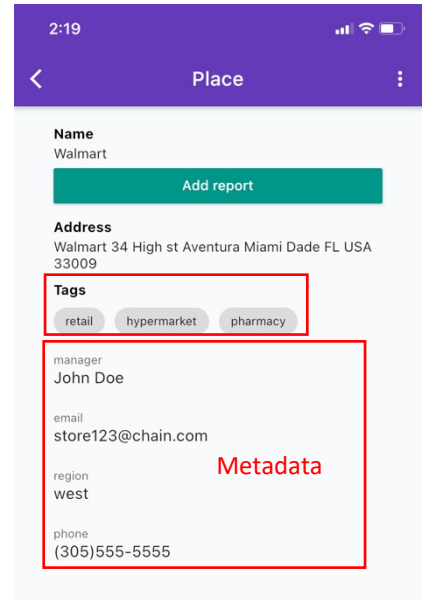
1. Go to Places
2. Click on the More Options menu and select “Import Places”

3. Select and copy the data from your Excel or Google Sheet spreadsheet. It should contain the following fields: display\_name, chain, street\_number, street\_name, city, county, state, country, postal\_code, latitude\_longitude, tags, and metadata. You can find a sample spreadsheet in the “Example” link.
4. Click “Next”, check the information on the next screen, and click on “Upload”.

### About the fields “tags” and “metadata”

The fields “tags” and “metadata” allow you to attach custom information to your places. However, they have different functions:

- “Tags” are labels that allow you to classify your places and filter information. For instance, if your places are mostly retail stores, you can have tags such as “supermarket”, “convenience”, and “hypermarket”. Tags should be listed without quotes and separated by commas:  
retail, hypermarket, pharmacy
- “Metadata” are key pieces of information about each place that will be displayed on the VB2 app so the mobile users will have access to them, for instance:  
phone=(212)555-5555, manager=John Doe,  
email=store123@chain.com, region=west



## 4.1 Assigning Places

VB2 uses the concept of “followers” to assign users to places:

1. Go to “Places”
2. Filter by adding tags, metadata, and/or any part of the address on the search bar, for instance, here is an example of a search combining two fields:

tag / part of address					
<input type="checkbox"/> Name ↑	Chain	Address	Tags	Metadata	
<input type="checkbox"/> CVS 172	CVS	17209 Pines Blvd Pembroke ...	drugstore,pharmacy,retail	region=west size=drugstore	
<input type="checkbox"/> Walgreens	Walgreens	18400 Pines Blvd Pembroke ...	drugstore,pharmacy,retail	region=west size=drugstore	
<input type="checkbox"/> Walgreens	Walgreens	15989 Pines Blvd Pembroke ...	drugstore,pharmacy,retail	region=west size=drugstore	

3. Select the places to be assigned by clicking on the appropriate checkboxes
4. Click on the More Options menu and select “Add followers”
5. Select the appropriate users and whether they can make changes to the place (box “Is editor\*”) and click on “Apply”

**Now that you have created Users, Scenarios, and Places, as well as assigned followers to Scenarios and Places, reps can:**

- access the VB2 mobile app
- check in from specific places they are follow or from any other location (as in the case of lunch breaks, for instance)
- submit reports by answering scenarios

## 5 The VB2 Mobile App

The VB2 Mobile App can be downloaded from the following links:

- App Store: <https://apps.apple.com/us/app/visitbasis2-for-merchandisers/id1455781488>
- Google Play: <https://play.google.com/store/apps/details?id=com.visitbasis.mobile>

After downloading and installing the VB2 app, your reps just need to load the app and type their email address. Upon submitting it, they will receive a numeric password via email.

### Checking In

Your reps can check in wherever they are, whether they are following Places or not. To check in:

Anywhere, independent on followed Places:

- On the Maps screen, tap on the More Options menu and select “Check In”

On a specific Place:

1. On the Places screen, select the place
2. Tap on the More Options menu and select “Check In”

### Submitting Reports

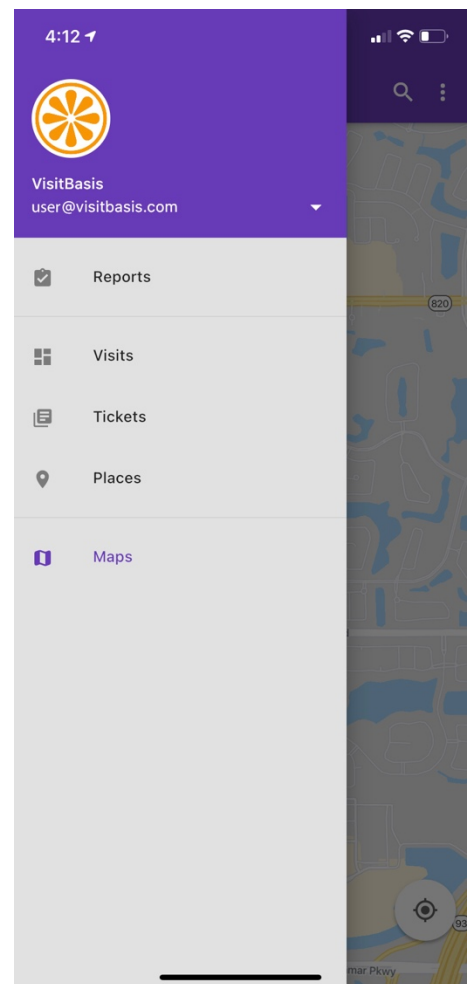
Similar to check-ins, reports can be submitted from anywhere or from a specific Place:

To submit a report from no specific place:

1. On the Reports screen, tap on the More Options menu and select “Add report”
2. Select the appropriate Scenario
3. Fill in and submit the report

To submit a report from a specific place:

1. On the Places screen, select the place
2. On the place information screen, tap on “Add report”
3. Select the appropriate Scenario
4. Fill in and submit the report



## Planning Visits from the Office

You can also choose to plan and schedule visits for your reps from the office. To do so, follow the steps below:

### 6 Creating Jobs

On VB2, Jobs are a way to organize visits into specific projects or cost centers. They are the connection between scenario(s) and its/their assigned user(s). To create a Job:

1. Go to the Visits -> Jobs window
2. Click on the More Options menu and select "Create Job"
3. Fill in name and select Scenario(s) and Assignee(s), if applicable
4. If necessary, click on "more options" and fill in information on description, tags, and here you can also enable the "require GPS on start" function with accuracy and proximity values. Let's suppose here you indicate the maximum allowed distance from the place of 100 m/300 ft. Then, if a rep is farther than 100 meters, he/she will not be able to perform the job
5. Click on "Create job"
6. Select the jobs to be assigned by clicking on the appropriate checkboxes
7. Click on the More Options menu and select "Add followers"
8. Select the appropriate users and whether they can make changes to the job (box "Is editor\*") and click on "Apply"

### 7 Creating Schedules

In VB2, Schedules are a way to group Visits and link them to a Job. To create a Schedule:

1. Go to the Visits -> Schedule window
2. Click on the More Options menu and select "Create Schedule"
3. Fill in name and enter description, if applicable
4. Click on "Create schedule"
5. Select the schedules to be assigned by clicking on the appropriate checkboxes
6. Click on the More Options menu and select "Add followers"
7. Select the appropriate users and whether they can make changes to the schedule (box "Is editor\*") and click on "Apply"

### 8 Creating Visits

In VB2, Visits are specific to a Place. However, visits can be set up as recurring, so several visits to the same place can be scheduled at a time:

1. Go to the Visits window
2. Click on the More Options menu and select "Create Visit"
3. Select Date (or starting date, in case of recurring visits)
4. Select Schedule
5. Select Place
6. Select Job
7. If applicable, check the box "Recurrence", add the frequency in weeks and select end date
8. If applicable, check the box to notify assignees of visit creation

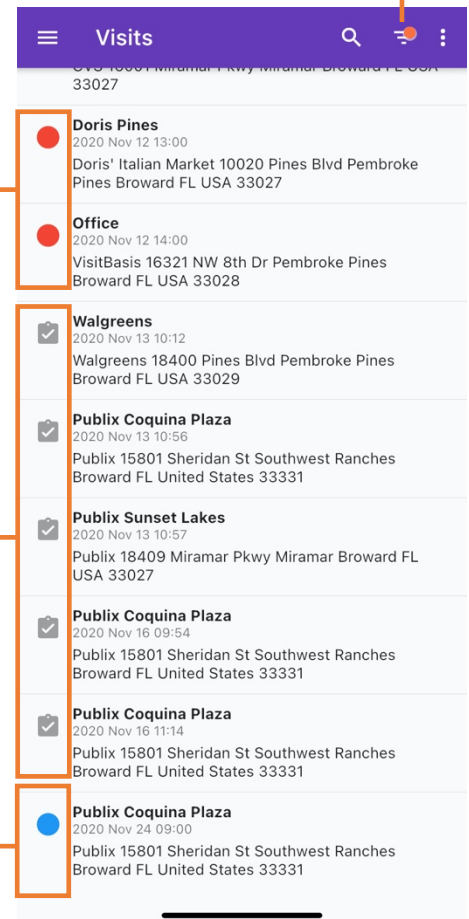
Filter visits

With the above steps completed, your mobile users will be able to view their scheduled visits on the VB2 app and file reports for each visit.

Overdue visits  
Users can still file reports  
for these visits.

Completed visits  
Users can see the reports  
that were filed for these visits.



Upcoming/open visits



To refresh (force sync) the visits, swipe down on the Visits window or tap on the More Options menu and tap on Refresh.

## 9 Viewing Reports on the Office App

As soon as Reports are filed and synched on the VB2 mobile app, they will be available for viewing on the office app / browser interface. To view visit reports:

1. Go to the Reports window
2. Click on the Filters menu  and select the date range (today's reports are displayed as default)
3. Select a visit  
Here you can:
  - Download a PDF version of the report by clicking on "Download as PDF"
  - Add comments to the report
  - Click on the Answers tab , then:
    - Edit (if editor) any answers if needed by clicking on "View/edit"
    - Comment on, as well as rate the answers

## 10 Downloading CSV Files of Scenario Reports

The Reports -> Responses tab allows you to download Excel / Google Sheets CSV files of your Scenario reports. To download a report:

1. Select the Scenario
2. Select the date range
3. Click on "Download as CSV"

## Support

The VisitBasis team is here to help you and we will assist you with any issues you may find using our system, from helping you upload data to finding the best ways to manage a campaign.

To contact us:

1. Go to the Support tab
2. Click on "Read help documentation or submit ticket"
3. If you don't find useful help by using the search function, click on "Submit Ticket"

Thank you for choosing VisitBasis!